

# Montana TRS

## Membership Benefit Estimate Web System

### Getting Started Document

In your web browser, navigate to the TRS web site at: <http://www.trs.doa.state.mt.us/>

Click on the 'Members' link located on the menu to the left, then click on the 'Benefit Estimate' Link. You may also just type **estimate** after the .us/ in the web address.

The following screen will appear:

The screenshot shows a web browser window titled "Benefit Estimate System - Microsoft Internet Explorer". The address bar shows the URL "https://www.trs.doa.state.mt.us/member\_est/Est\_Frame.html". The page has a blue header with the text "Montana Teachers' Retirement System". On the left side, there is a vertical menu with the following links: "TRS Home", "Login", "Create an Account", "Edit My Account", "Change Password", "User's Guide", and "Logout". The main content area has a heading "Welcome to the Montana Teachers' Retirement System's Retirement Estimate Application". Below this, there are two paragraphs of text: "If you have established a User ID and password previously, please sign on below." and "If you have never logged on to this application before, please click on the link on the left to establish a new User ID and password." Below the text, there are two input fields labeled "User ID:" and "Password:", followed by a "Login" button. The browser's status bar at the bottom shows "Done" and "Trusted sites".

If this is the first time using the system, click on the [Create Account](#) link on the left. If you have already created an account, enter your User ID and password here.

If you have already created an account, skip to the **Benefit Estimate** section, otherwise enter your information where requested and click next. This information must match the information we have on file in order to gain access.

The screenshot shows a web browser window titled "Benefit Estimate System - Microsoft Internet Explorer". The address bar displays "https://www.trs.doa.state.mt.us/member\_est/Est\_Frame.html". The page content is titled "Montana Teachers' Retirement System". On the left, there is a blue sidebar with a menu containing the following items: "TRS Home", "Login", "Create an Account", "Edit My Account", "Change Password", "User's Guide", and "Logoff". The main content area is titled "New User Sign-up" and includes the instruction "Please enter the following information:". Below this, there is a form with the following fields: "Last Name:" with a text input box, "First Name:" with a text input box, "Middle Name:" with a text input box, "Social Security No:" with a text input box and a note "(no dashes)", and "Date of Birth" with a date picker showing "mm-dd-yyyy" and a note "(mm-dd-yyyy)". A "Next" button is located at the bottom right of the form. The browser's status bar at the bottom shows "Done" and "Trusted sites".

If the information entered matches with what the TRS has on file, the following screen will display:

Benefit Estimate System - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Forward Stop Search Favorites Media Print

Links Customize Links Montana Teachers FOI/News.com Microsoft Outlook Web Access - Logon State of Montana Teachers' Retirement System Yahoo! Windows

Address [https://www.trs.doa.state.mt.us/member\\_est/Est\\_Frame.html](https://www.trs.doa.state.mt.us/member_est/Est_Frame.html) Go

### Montana Teachers' Retirement System

[TRS Home](#)  
[Login](#)  
[Create an Account](#)  
[Edit My Account](#)  
[Change Password](#)  
[User's Guide](#)  
[Logoff](#)

New User Sign-up

Please enter the following information.

|                                     |   |
|-------------------------------------|---|
| Last Name:                          | <input type="text"/>  |
| First Name:                         | <input type="text"/>  |
| Middle Name:                        | <input type="text"/>  |
| Social Security No:                 | <input type="text"/> (no dashes)  |
| Date of Birth                       | <input type="text"/> - <input type="text"/> - <input type="text"/> (mm-dd-yyyy) |
| <input type="button" value="Next"/> |   |

Done Trusted sites

Complete the requested information. You may choose to use your SSN as your login ID or alternatively have the system generate a unique ID for you. It is important that your E-Mail address is accurate as that is the address the system will E-Mail your User ID to.

After clicking on the Next button, you will be presented with a screen containing your membership information.

## Benefit Estimate:

Benefit Estimate System - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Forward Stop Search Favorites Media Print

Links Customize Links Montana Teachers FOWNews.com Microsoft Outlook Web Access - Logon State of Montana Teachers' Retirement System Yahoo! Windows Google Groups SABHRS Home Page

Address https://www.trs.state.mt.us/member.asp/Est\_Frame.html

Montana Teachers' Retirement System

TRS Home  
Login  
Create an Account  
Edit My Account  
Change Password  
User's Guide  
Logout

Saved Estimate Parameters -- [Click here to select another estimate](#) ?

| No. | Description       |
|-----|-------------------|
| 1   | Original Estimate |

[Click here to save as a NEW Estimate](#) Enter a description for this estimate (Enter a new description if this is a new estimate, or you wish to rename the existing estimate)

☐ ?

By checking the above box and entering a description, when you click continue, a new estimate will be saved with the information entered below.

| Full Name | DOB | Total Contributions | Total Interest | Total Balance |
|-----------|-----|---------------------|----------------|---------------|
|           |     |                     |                |               |

| Last 5 (full) years salary information |              | Beneficiary Information |      |            |
|--|--------------|-------------------------|------|------------|
| Fiscal Year                            | Annual Wages | Use for Estimate        | Name | Birth Date |
| 2000                                   |              | <input type="radio"/>   |      |            |
| 2001                                   |              | <input type="radio"/>   |      |            |
| 2002                                   |              | <input type="radio"/>   |      |            |
| 2003                                   |              | <input type="radio"/>   |      |            |

Check if Beneficiary is Spouse: ☐

Overrides

Enter Current Contract Amount (this year's salary amount) 0

Enter Retirement Date (mm/yyyy) 4 / 2004

Estimated Salary Increase Percentage (i.e. 4%, Enter 4.0) 0

Service as of last FY End

Enter Termination Pay 0

Purchable Service 0

Enter Highest three consecutive salary amounts (override)

Year 1 (Most Recent)

Year 2

Year 3 (Least Recent)

Continue

Enter any additional information including:

- ✓ A description for this estimate (for help in later retrieval)
- ✓ Current contract amount
- ✓ Termination Pay
- ✓ Additional Service
- ✓ Three different consecutive years' salaries

Click on Continue when you are satisfied with your choices.

If you wish to save several (up to 5) scenarios, you may do so by clicking on the check box labeled "Click here to save as a NEW Estimate" and entering a description for this estimate. You may then recall this estimate at a later time by clicking on the link at the top of the page labeled "[Click here to select another estimate](#)". You are also presented with a list of saved estimates next time you logon to the system.

[Click here to save as a NEW Estimate](#) Enter a description for this estimate (Enter a new description if this is a new estimate, or you wish to rename the existing estimate)

☐ ?

By checking the above box and entering a description, when you click continue, a new estimate will be saved with the information entered below.

Benefit Estimate System - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Forward Stop Search Favorites Media Print

Links Customize Links Montana Teachers FOXNews.com Microsoft Outlook Web Access - Logon State of Montana Teachers' Retirement System Yahoo! Windows Google Groups SABHRS Home Page

Address https://www.brs.state.mt.us/member\_est/Est\_Frame.html Go

## Montana Teachers' Retirement System

[Click Here to enter modify parameters.](#) [Printer Friendly Version](#)

This is an **estimate** and is not to be construed as a firm commitment of an amount to be paid. When projections are made, many factors may affect the final retirement benefit, including future changes in law and/or administrative rules.

|   |   |
|---|---|
| Estimate No: 1 saved as: <b>Original Estimate</b> |   |
| <b>Retirement Estimate For:</b>                   | <b>Birth Date:</b>                              |
| <b>Retirement Date:</b> 2/1/2004                  | <b>Today's Date/Time:</b> 2/20/2004 10:57:09 AM |
| <b>Beneficiary:</b> (non-spouse)                  | <b>Bene. Birth Date:</b>                        |

|                                   |    |  |  |
|-----------------------------------|----|--|--|
| <b>Average Final Compensation</b> | \$ |  |  |
|-----------------------------------|----|--|--|

|                               |    |
|-------------------------------|----|
| <b>Highest 3 Years Salary</b> |    |
| 2002                          | \$ |
| 2003                          | \$ |
| 2004                          | \$ |

### Optional Forms of MONTHLY Retirement Benefits

|                                  |   |
|----------------------------------|---|
| <b>Retirement Income Option</b>  |   |
| Normal Form                      | \$  |
| A. Joint and Full to Beneficiary | (Not Applicable - Non-spouse beneficiary) |
| B. Joint and 1/2 to Beneficiary  | \$1                                       |
| C. Joint and 2/3 to Beneficiary  | (Not Applicable - Non-spouse beneficiary) |

|                                |     |
|--------------------------------|-----|
| <b>Period Certain and Life</b> |     |
| 10 Year Term                   | \$1 |
| 20 Year Term                   | \$1 |

### Information Used to Calculate above Estimate

|                                   |                           |
|-----------------------------------|---------------------------|
| Projected Service Years:          | 2                         |
| Termination Pay:                  | 0.00                      |
| Age as of Retire Eff. Date:       | years,  months            |
| Beneficiary is:                   | 3 years older than member |
| Projected Annual Salary Increase: | 0%                        |

Done Trusted sites

The above screen will display your estimate. You may click on the Printer Friendly link for a printable version of this estimate.